

E-Grants Security User Guide

Montana Office of Public Instruction



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Introduction

The E-Grants User Logon Page gives access to E-Grants for an LEA through users entering their email address and assigned password.



Before getting started, please be sure that any Internet Explorer browsers have **Compatibility View** and **Pop-Up Blockers turned off**.

The E-Grants User Login Page displays 3 different links available to users.

Forgot Password: The Forgot Password link allows a user to request a password if they no longer can logon because of a forgotten password. When requested, the user will receive an email with a one-time temporary password. Upon entering this password the user will be requested to change their password following these guidelines: Minimum length 8 characters, minimum 1 uppercase letter, minimum 1 lowercase letter, and minimum 1 numeric character.

New User: The new user link allows a user to request credentials for accessing E-Grants or to establish a new Legal Entity in E-Grants. Requests for new users will first be submitted to the Authorized Representative for the district the user is requesting to be associated with. The Authorized Representative may accept or deny the user request. If accepted the request will be submitted to the OPI Security Administrator who has the final authority to grant or deny access. Requests for new vendors/organizations will be sent directly to the OPI Security Administrator for approval.

Public Access: Public access allows a user to view approved applications without entering a Username/Email and password.

E-Grants System OPI Home

Montana Office of Public Instruction
Welcome to the E-Grants Management System

ANNOUNCEMENTS

E-GRANTS TIPS
-- Refer to "How to Access Your Grants" in the Training section for guidance on the E-Grants Menu layout.
-- Refer to the "Security Help Manual" in the Training section for guidance on new user accounts, removal of users, and role modifications to existing accounts. Descriptions of the available roles are under Account Information below.
-- If your role is accurate but you need to change your name or email address, send an email to egrants@mt.gov providing the new name and/or email address. Changes will be completed by OPI staff as soon as possible.
Authorized Representatives, please use "Manage User Accounts" on your menu list to keep your district/organization's user accounts up-to-date. Remove any users who are no longer with your district/organization.

LOGON

Username/Email

Password [Forgot Password](#)

[New User](#) [Public Access](#)

INFORMATION

WHO DO I CONTACT?
If there are questions about your grant application, please contact the appropriate program specialist. A full list of contact information may be found here.
OPI Grant Program Contacts
Please email the E-Grants Security Help Desk at egrants@mt.gov with any questions regarding your E-Grants account, user name, or password.

TRAINING

- How To Access Your Grants: E-Grants Access Select Instructions
- Security Help Manual: E-Grants Security User Guide
- Carl Perkins Assistance Videos (approx. 20 minutes each)
 - Perkins Main Sections
 - Perkins Budgets
 - Perkins End-of-Year Reports

ACCOUNT INFORMATION

GENERAL ACCOUNT INFORMATION
The E-Grants system may require you to change your password if you have not done so within the previous 180 days. Please follow the system prompts to do so.

UPCOMING

March 2017

March 1, 2017 - March 31, 2017
The Intent to Apply for the 2017-2019 Gifted and Talented State Grant opens on March 1, 2017. Submissions are due by close of business Friday, March 31, 2017.

Quick Tips & FAQs

➤ ***I have a question about E-Grants security. Who do I contact?***

Before contacting OPI directly, please review this entire document. We have tried to list clear step-by-step instructions so that users do not need to rely on our specialists' availability to receive answers to their questions.

In the event that your question is not answered within this document, please submit your question, via email, to our Security Helpdesk at egrants@mt.gov. Our security coordinator will respond to you within 24 hours.

➤ ***I need an E-Grants account. What now?***

Please skip ahead to the [New User Set-Up](#) section.

➤ ***Where is the E-Grants Security Form?***

All E-Grants security will now be done through the E-Grants system itself. No more paper forms- hooray!

➤ ***Why is my password not working?***

All E-Grants passwords expire after 90 days. If you receive an error message stating that your password has expired, please follow the [Forgot Password](#) instructions on page 5.

➤ ***I have an E-Grants account but I'm switching districts. How do I change my security access to the new district?***

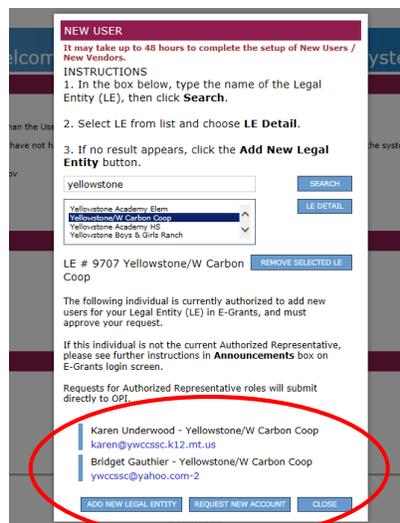
Please see the section [Modify Existing Users](#).

➤ ***I requested a new account for my superintendent three weeks ago. How do I know if their account was created?***

If you have submitted a **New User Request** on behalf of a coworker or supervisor, you will not receive a notification email once that process has been completed. Only the email address listed on the New User account will receive a notification. Please have the requested new user themselves check their email for the E-Grants notification.

➤ ***My organization has two Authorized Representatives listed, but one of them isn't with our district anymore. How do we remove them?***

Please have the current Authorized Representative remove any outdated Authorized Representatives using the instructions listed in the section [Modify Existing User Accounts](#).



➤ ***I am trying to create a New User Request and/or add another district to my account, but the contact information for my Authorized Representative doesn't appear when I select my LE. What now?***

In this instance, you will see the **error message** circled below. The AR Contact Information in this section is extracted from the [OPI Contacts](#) system. If no contact information is listed, this means that OPI Contacts must be updated prior to the submission of any E-Grants account requests. The OPI Contacts system can only be accessed by district clerks.

- **For New Superintendents:** If an Authorized Representative has recently been hired, the district clerk must use the [OPI Contacts](#) system to update the Authorized Representative's contact information. (If a district clerk is not available, please email CentralUpdates@mt.gov. Once OPI Contacts is updated, the Authorized Representative may request access to the E-Grants system, and once provided with an account, may approve requests for all other staff.
- **For LEAs that are not school districts:** Update Authorized Representative contact information by emailing CentralUpdates@mt.gov.
- **No Available Superintendent:** If a district superintendent or other Authorized Representative has recently left the district, please complete an Authorized Representative Exception form and submit to OPI to grant temporary Authorized Representative rights to another person. This person may then request access to E-Grants.
- **For All Other Roles:** Please ensure that there is an Authorized Representative on file prior to attempting a request for E-Grants rights. The system will not allow this request to be submitted.

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS

1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

yellowstone

Yellowstone Academy Elem
Yellowstone/W Carbon Coop
Yellowstone Academy HS
Yellowstone Boys & Girls Ranch

LE # 9855 Yellowstone Academy HS

The following individual is currently authorized to add new users for your Legal Entity (LE) in E-Grants, and must approve your request.

If this individual is not the current Authorized Representative, please see further instructions in **Announcements** box on E-Grants login screen.

Requests for Authorized Representative roles will submit directly to OPI.

Unable to find any local security admins with the provided search criteria. If you would like to request a logon to E-Grants, click the request new account button.

Powered by **MTW Solutions** Management System

Forgot Password

Step 1. If a user has either forgotten their password – OR – has an expired password, enter the user's email address and click the **Forgot Password** link.

E-Grants System

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Welcome to the E-Grants Management System

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-- If your role is accurate but you need to change your name or email address, send an email to egrants@mt.gov providing the new name and/or email address. Changes will be completed by OPI staff as soon as possible.

Authorized Representatives, please use "Manage User Accounts" on your menu list to keep your district/organization's user accounts up-to-date. Remove any users who are no longer with your district/organization.

INFORMATION

WHO DO I CONTACT?
If there are questions about your grant application, please contact the appropriate program specialist. A full list of contact information may be found here.
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Please email the E-Grants Security Help Desk at egrants@mt.gov with any questions regarding your E-Grants account, user name, or password.

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ACCOUNT INFORMATION

GENERAL ACCOUNT INFORMATION
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LOGON

Username/Email ?

Password **Forgot Password**

LOGON

[New User | Public Access](#)

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Step 2.

The system will display a message informing the user that an email has been sent with a **one-time temporary password**.

When the user enters this password, he or she will be prompted to change the password.

Note the password requirements when setting a new password.

PASSWORD EXPIRED - PLEASE CHANGE

Old Password

New Password

Confirm New Password

CHANGE **CANCEL**

Password Requirements

- A password must have a minimum length of 8 characters.
- A password must have a minimum of 1 lower case letters.
- A password must have a minimum of 1 upper case letters.
- A password must have a minimum of 1 numeric characters.

Helpful Hint!

Once the user has entered their email address and temporary password, this box (at left) will appear.

The user must enter the temporary password in the Old Password box in order to create a new password. Do not attempt to input a previous password once the **Forgot Password** process has been initiated.

Do not click Forgot Password multiple times.

New User Set-Up



NOTE: The New User Set-Up function only applies to users who have never been assigned an E-Grants account. For existing users, please see [Modify Existing Accounts](#).

Step 1. Select the **New User** link from the E-Grants Logon Page.

Step 2. Enter the name of the **Legal Entity (LE)**.

The Legal Entity may consist of a Local Education Agency (LEA), a not-for-profit organization, an institution of higher education, or other vendor receiving grant funding from the Montana Office of Public Instruction. Click **Search**.



Step 3. Select the Legal Entity (LE) from the list, and click **LE Detail**.

E-Grants System

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS

1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

Bozeman

SEARCH

LE DETAIL

REMOVE SELECTED LE

ADD NEW LEGAL ENTITY CLOSE

Bozeman Elem
Bozeman H S
Bozeman Shelter Care Fac
Bozeman Boys & Girls Club



This will add the Legal Entity to your account request. The LE name and number will appear in the lower half of the pop-up window.

E-Grants System

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS

1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

Bozeman

SEARCH

LE DETAIL

REMOVE SELECTED LE

LE # 0350 Bozeman Elem

The following individual is currently authorized to add new users for your Legal Entity (LE) in E-Grants, and must approve your request.

If this individual is not the current Authorized Representative, please see further instructions in **Announcements** box on E-Grants login screen.

Requests for Authorized Representative roles will submit directly to OPI.

Steve Johnson - Bozeman Elem
steve.johnson@bsd7.org

ADD NEW LEGAL ENTITY REQUEST NEW ACCOUNT CLOSE

Bozeman Elem
Bozeman H S
Bozeman Shelter Care Fac
Bozeman Boys & Girls Club

Step 4. To add additional LE(s), select another LE from the list and click **LE Detail**.

The screenshot shows a 'NEW USER' modal window. At the top, it says 'NEW USER' and 'It may take up to 48 hours to complete the setup of New Users / New Vendors.' Below this are instructions: 1. In the box below, type the name of the Legal Entity (LE), then click **Search**. 2. Select LE from list and choose **LE Detail**. 3. If no result appears, click the **Add New Legal Entity** button. The search box contains 'Bozeman' and the 'SEARCH' button is highlighted. Below the search box is a dropdown list with 'Bozeman H S' selected and circled in red. To the right of the dropdown is an 'LE DETAIL' button, also circled in red. Below the dropdown, the text reads 'LE # 0350 Bozeman Elem, LE # 0351 Bozeman H S' and a 'REMOVE SELECTED LE' button. Further down, it lists authorized individuals: Steve Johnson - Bozeman Elem (steve.johnson@bsd7.org) and Steve Johnson - Bozeman H S (steve.johnson@bsd7.org). At the bottom are buttons for 'ADD NEW LEGAL ENTITY', 'REQUEST NEW ACCOUNT', and 'CLOSE'.



The screenshot shows the 'NEW USER' modal window with 'cottonwood' in the search box. The dropdown list shows 'Cottonwood Elem' selected. A 'REMOVE SELECTED LE' button is highlighted with a red arrow. To the right of the modal is a speech bubble containing the text: 'Help! I accidentally selected the wrong LE! What do I do now?'. Below the speech bubble is the text: 'Not a problem- simply click the **Remove Selected LE** button to clear your settings.'

Step 5. To add an additional LE that requires a new search, type the new LE name. Any previously added Legal Entities will remain in your list. The Authorized Representative listed for each LE added will appear in the bottom of the screen.

Step 6. Once all LEs have been selected, click **Request New Account**.

NEW USER
It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS

1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

cottonwood

Cottonwood Elem
Cottonwood Elem
Cottonwood Elem

LE # 0350 Bozeman Elem, LE # 0351 Bozeman H S, LE # 0182 Cottonwood Elem

The following individual is currently authorized to add new users for your Legal Entity (LE) in E-Grants, and must approve your request.

If this individual is not the current Authorized Representative, please see further instructions in **Announcements** box on E-Grants login screen.

Requests for Authorized Representative roles will submit directly to OPI.

- Steve Johnson - Bozeman Elem
steve.johnson@bsd7.org
- Steve Johnson - Bozeman H S
steve.johnson@bsd7.org
- Doug Ellingson - Cottonwood Elem
D.Ellingson@co.custer.mt.us

Step 7. The **New User Request** form appears.

NEW USER REQUEST

LE # 0350 Bozeman Elem, LE # 0351 Bozeman H S

Authorized Rep requests are submitted directly to OPI. All other account requests are submitted to the contact listed below.

First Name

Last Name

Email

Role
None Selected

Comment

Authorized Representative

- Steve Johnson - Bozeman Elem
steve.johnson@bsd7.org
- Steve Johnson - Bozeman H S
steve.johnson@bsd7.org

Step 7. Enter the appropriate **contact information** into the form and click **Submit**.



You may only select one **Role** type on single New User Request. If you required different roles (for example, Business Manager at one district but Authorized Representative at another district), please submit two requests.

NEW USER REQUEST

LE # 0350 Bozeman Elem, LE # 0351 Bozeman H S, LE # 0182 Cottonwood Elem

Authorized Rep requests are submitted directly to OPI. All other account requests are submitted to the contact listed below.

First Name
Johnny

Last Name
Appleseed

Email
johnappleseed@mt.gov

Role
Financial Data Entry

Comment
TEST

Authorized Representative

- Steve Johnson - Bozeman Elem
steve.johnson@bsd7.org
- Steve Johnson - Bozeman H S
steve.johnson@bsd7.org
- Doug Ellingson - Cottonwood Elem
D.Ellingson@co.custer.mt.us

SUBMIT CANCEL

Each request will be delivered to the Authorized Representative listed for each LE selected. For users requesting access to both Elementary and High School districts, the Authorized Representative will receive two requests.

Step 8. Your request has been **submitted!**

If you have requested the **Authorized Representative** role, your request will submit directly to OPI security staff.

If you have requested **any other role**, the Authorized Representative for that Legal Entity must approve your request and submit it to OPI. Please contact your Authorized Representative and have them approve the request, as per the instructions on page.



Modify an Existing Account



If the user has an existing E-Grants account, please use this process to add or change access to an additional Legal Entity, or add additional roles or rights within a given Legal Entity.

Step 1. Select **Manage User Accounts**. This is a new page that will allow users to request additional LEs or roles, as well as allow Authorized Representatives to view, reassign or remove all users within their LE.

The screenshot shows the 'E-Grants System' interface. At the top left is the logo for the Office of Public Instruction. The page title is 'E-Grants System'. On the right, there are links for 'OPI Home' and 'Sign Out'. Below the header is a 'Menu List' section with a link for 'Click for Instructions'. The main content area displays a message: 'You have been granted access to the forms below by your Security Administrator'. Underneath, there are two categories: 'Administrative' and 'Planning'. Under 'Administrative', there are links for 'OPI Reports', 'E-Grants User Administration', and 'Manage User Accounts' (which is highlighted with a red box). Under 'Planning', there are links for 'Planning Tool', 'eGrants Access / Select', 'Funded Applications', and 'Other Data Collections'.

Step 2. On the **Manage User Accounts** page, the user will see a link with their name.

If the user has the Authorized Representative role, the user will see a list of all users within their Legal Entity.

The screenshot shows the 'Manage E-Grants User Accounts' page. At the top left is the logo for the Office of Public Instruction. The page title is 'E-Grants System'. On the right, there are links for 'OPI Home' and 'Click to Return to Menu List / Sign Out'. Below the header is a blue bar with the title 'Manage E-Grants User Accounts' and a dropdown menu for 'LE: Browning Elem'. Below this is a table with the following data:

| LE USERS | | |
|---------------|----------------------|---|
| Name | Email Address | User Role |
| Jason Andreas | jasona@bps.k12.mt.us | User Guides - LEA , LEA Financial Data Entry , LEA Data Entry |
| Stacy Edwards | stacye@bps.k12.mt.us | LEA Business Mgr , User Guides - LEA , LEA Data Entry |
| Jeri Matt | jerim@bps.k12.mt.us | LEA Data Entry |
| John Rouse | johnr@bps.k12.mt.us | LEA Auth Rep , User Guides - LEA , leaSecurityAdmin |

Step 3. To add an additional business role to an existing assigned LE, follow the instructions on the screen to **Amend Current Access**.

To request access to a different LE, follow the instructions on the screen to **Add Additional LE**.

Once all new requested access has been added to your screen, select **Request**. This will submit your request to the Authorized Representative for the requested LE.

**NOTE: Only the Authorized Representative may remove a user's access from an LE.
Non-AR users may not remove themselves.**



Conversely, only a user may request new access for his or her account. The Authorized Representative may not request access for their staff.

NEW USER REQUEST

Browning Elem [Helpful Hints & Frequently Asked Questions](#)

John Rouse Email: johnr@bps.k12.mt.us

Current Access: LEA Auth Rep, User Guides - LEA, leaSecurityAdmin

To Amend Current Access:
Use **ASSIGN** to request role(s).
Use **UNASSIGN** to remove role(s) as needed.
Select **REQUEST** to complete transaction.
To remove a user from the LE completely, click **REMOVE USER** button.

To Add Additional LE:
To establish an account with a different LE, enter LE Name, then click **SEARCH**.
Select LE from list and choose **LE DETAIL**.
Current Assigned business roles will be **automatically** requested. Use unassign/assign to remove or request role(s) with the different LE.
Select **REQUEST** to complete transaction.
Use the **CLOSE** button to erase selections and start over.

Comment:

Enter LE Name:

| AVAILABLE BUSINESS ROLES | ASSIGNED BUSINESS ROLES |
|--|--|
| LEA Business Mgr LEA Business Manager <input type="button" value="assign"/> | LEA Authorized Rep <input type="button" value="unassign"/> |
| LEA Data Entry LEA Data Entry <input type="button" value="assign"/> | LEA Level Security Administrator <input type="button" value="unassign"/> |
| LEA Financial Data Entry LEA Financial Data Entry <input type="button" value="assign"/> | Assigns Access to User's Guides on the Menu List <input type="button" value="unassign"/> |

Authorized Representative Review of User Requests

When a user successfully submits a request for access to E-Grants, the Authorized Representative for the district/Legal Entity will receive an email informing them of the request. To review user requests, the Authorized Representative will do the following:

Step 1. Log into E-Grants.

Step 2. Select **Security Request To Do List** from the Main Menu, under the **E-Grants User Administration** category.

You have been granted access to the forms below by your Security Administrator

- Administrative
 - [OPI Reports](#)
- E-Grants User Administration
 - [Manage User Accounts](#)
 - [Security Request To Do List](#)
- EGrants User Guides
 - [Comprehensive User Guide](#)
 - [Creating Amendments User Guide](#)
 - [Payment System User Guide](#)
- Planning
 - [Planning Tool](#)
- eGrants Access / Select
 - [Funded Applications](#)
 - [Other Data Collections](#)

Step 3. If the Authorized Representative is associated with multiple organizations, they will need to select the correct organization (LE) from the dropdown list to display the appropriate user request.

[Click to Return to Menu List / Sign Out](#)

The screenshot shows the 'EGrants Security Requests' header. Below it, there is a dropdown menu labeled 'Organization:' with three options: 'Browning Elem', 'Browning Elem', and 'Browning H S'. The dropdown is highlighted with a red oval. Below the dropdown, the text 'USER REQUESTS' is displayed, followed by 'No requests found'.

Step 4. Once the user request is displayed in the table, double-click on the request to select.

[Click to Return to Menu List / Sign Out](#)

The screenshot shows the 'GMS Access Requests' header. Below it, there is a dropdown menu labeled 'Organization:' with the value 'Harlem Elem'. Below the dropdown, the text 'USER REQUESTS' is displayed. A table with the following data is shown:

| Name | Date Submitted | Status | Status Date |
|--|----------------|------------------|---------------|
| New User Request for 47-Harlem Elem Ann Test | June 23, 2015 | SubmittedToLocal | June 23, 2015 |

Step 5. The selected **User Request** will be displayed. Under the **New User Request** heading, the role requested by the New User is displayed (see highlighted text).

Business roles available to local-level staff are displayed on the left-hand side.

By clicking **Assign** next to one (or more) of these roles, that user is now associated with that Legal Entity and that Business Role. These changes are applied when the reviewer clicks **Accept**.



An **Accept** action triggers a notification to the OPI Security Administrator that a user request is ready to be reviewed. Final acceptance by the OPI Security Administrator is needed before a new user is established in the system.

The **Reject** action triggers a notification to the requester's email that their request has been reviewed and denied.

The screenshot displays a web interface for managing user requests. At the top, a maroon header reads "NEW USER REQUEST". Below this, a light blue box contains the following information: "Harlem Elem - Harlem Elem", "Ann Test", "testa@harlem-k12.mt.us", "Data Entry role requested" (highlighted in yellow), and "LSA Email".

Below the user details, there are two columns of business roles. The left column is titled "AVAILABLE BUSINESS ROLES" and the right column is titled "BUSINESS ROLES TO ASSIGN".

The "AVAILABLE BUSINESS ROLES" column contains three items, each with an "assign" button:

- LEA Auth Rep
LEA Authorized Rep
- LEA Business Mgr
LEA Business Manager
- LEA Data Entry
LEA Data Entry

At the bottom right of the interface, there are three buttons: "ACCEPT", "REJECT", and "CLOSE".

New Legal Entity (LE) Set-Up

To create a new Legal Entity with the Montana Office of Public Instruction, please follow these instructions.

Step 1. Select the **New User** link from the **Logon Page**.

OPI Home

E-Grants System

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Authorized Representatives, please use "Manage User Accounts" on your menu list to keep your district/organization's user accounts up-to-date. Remove any users who are no longer with your district/organization.

LOGON

Username/Email ?
Password Forgot Password
LOGON

INFORMATION

WHO DO I CONTACT?
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ACCOUNT INFORMATION

GENERAL ACCOUNT INFORMATION
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New User Public Access

Step 2. Select the **Add New Legal Entity** button.

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS

1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

SEARCH

ADD NEW LEGAL ENTITY CLOSE

No notifications found.

Step 3. The **New Vendor Request Form** will display.

- The fields on the left should be completed for the **new vendor** (organization name, address, street address, city, state, zip code, phone number and website).
- The fields on the right should be completed for the **Authorized Representative** of the district (first name, last name, email and role) along with designating the authorized representative role.
- A completed IRS W-9 form must be uploaded using the **Attach W-9** button. In addition, a link to the OPI new Vendor Form is provided by selecting the highlighted 'New Vendor Form'.
- A completed new vendor form is uploaded by selecting the **Attach Vendor Form** button. If an incorrect form is uploaded, simply browse and select the correct form and it will replace the form previously uploaded. When the new vendor request is correctly completed select the **Submit** button.

NEW LEGAL ENTITY REQUEST

An IRS W-9 form and OPI New Vendor Form must be completed prior to submitting this New Legal Entity Request. Please contact (406) 444-3095 with any questions.

ATTACH W-9
ATTACH VENDOR FORM

Legal Entity (LE) Name

Address
Street

City

State
 Zip

County No.

Phone

Website

First Name

Last Name

Email

Role
Authorized Rep ▼

SUBMIT TO OPI CANCEL

Once the user has clicked **Submit**, a verification pop-up will appear informing the user that their request has been submitted. **The OPI Security Officer must approve the request.**

If approved, the new organization will be added to E-Grants and the Authorized Representative named in the request will be sent an email informing him/her that her request has been approved and providing them with their password.

At that time other user requests for access to that LE in E-Grants may be submitted.